Massachusetts Department of Revenue

Division of Local Services

SALTRAN
TRANSFERRING SALES INFORMATION FROM SALES TO INVENTORY
RPIS VERSION 3

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SALTRAN – Transferring Sales Information from Sales to Inventory

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Overview

Each year after Year Tag Rollover has been run and a new year's database has been created in the Inventory File, it's time to update the sales information in the new database. Although deeds are entered in the Par Sales record on an ongoing basis throughout the year, that same sales information needs to be transferred to the Parcel record in the new year's database. Owner Name 1, Sales Price, Sale Date and Sale Book and Sale Page are amongst the fields in the Parcel record that are used by other programs including Business Objects, IQ and the RPIS Property Record Card. Saving a Par_Sales record also stored that data in the Sales File, then at some point data from the Sales File should be copied back to the Inventory File. This is done by editing and running an IQ procedure that creates a transaction file. When that transaction file is executed in Real Property the required information is copied from the Sales File to the Inventory File. There are actually two different IQ procedures that can be used:

- SALTRAN5.iqr This file is used when you want to include the mailing address fields (owner mailing address will be copied from Sales to Inventory.
- SALTRAN8.iqr If you do not enter the mailing address information in the Par Sales record during the year or do not wish to transfer mailing address information from Sales to Inventory, use the stored procedure that excludes the mailing address fields.

The basic process in either case is:

1. Edit the IQ procedure for the desired fiscal year and the specific sale dates
2. Run the IQ procedure to create a transaction file (also known as a batch file) containing the data for each sale parcel to be updated
3. In RPIS, apply that data to the Inventory parcels by running the Batch Update utility (using the transaction file created by IQ.)

We'll use SALTRAN5 in the examples below.

Editing and Running the IQ Procedure

Whether you use SALTRAN5.iqr (with mailing address) or SALTRAN8.iqr (without mailing address), the editing process is the same.

Go to IQ and click File on the menu bar then click Open. In the IQOBJECT folder (or the folder containing your IQ report procedures), scroll through the list of stored procedures and open the appropriate procedure (SALTRAN5.iqr or SALTRAN8.iqr).

The procedure will be displayed In IQ's "Free Form" design window (see Figure 1.)

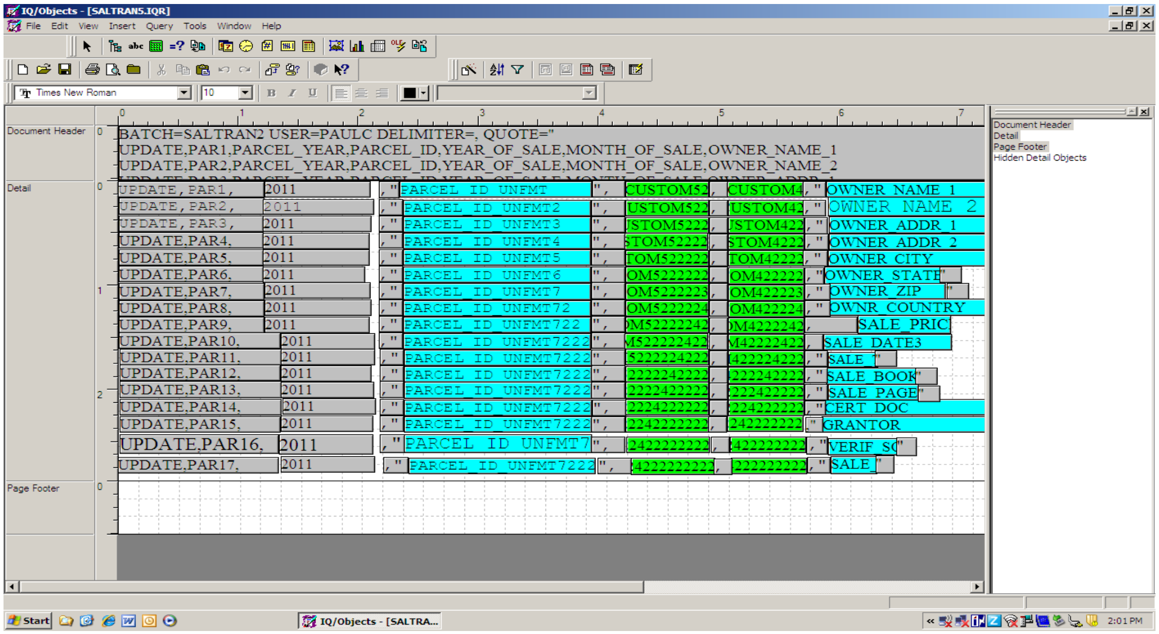


Figure 1 - SALTRAN5.iqr IQ procedure

There are two editing jobs that need to be done before running the procedure:

- Edit the “Filter” statement.
- Edit the Parcel Year <u>on each line</u> in the “Detail” section of the procedure.

To edit the “Filter” statement, click on the “Filter” icon on the tool bar  .

In the pop-up Filter screen, click on the “SALE_DATE” statement (see Figure 2).

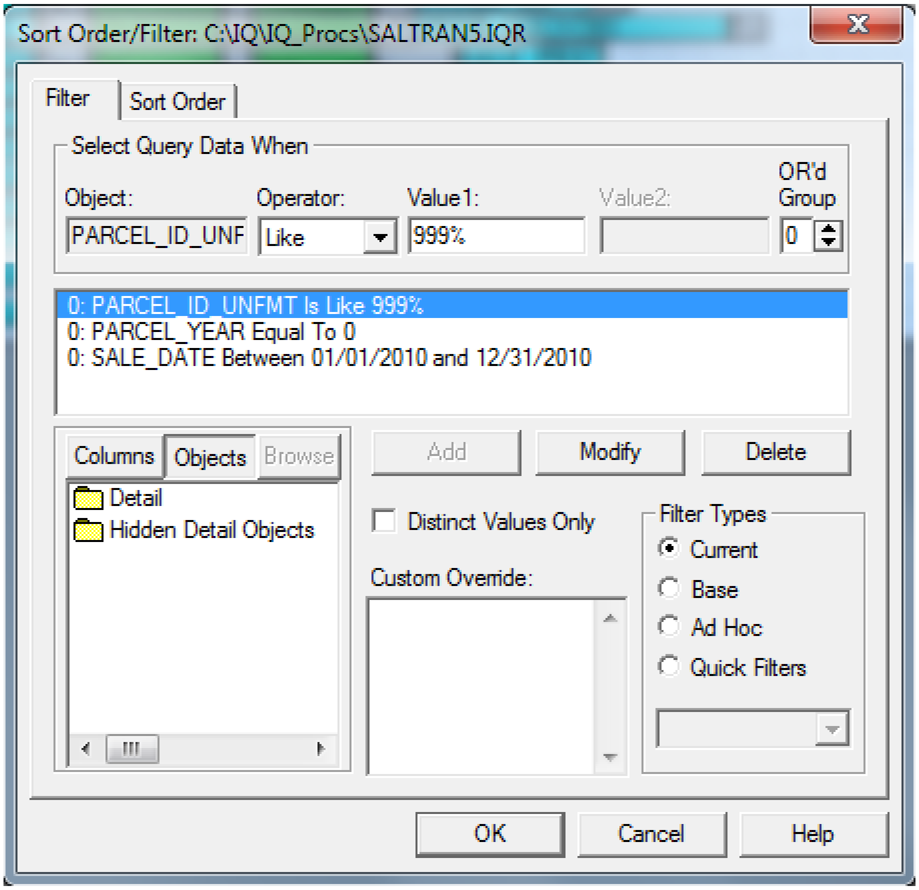


Figure 2 - Filter pop-up screen – before edit

In the “Value1” and “Value2” boxes, change the range of dates to the sale dates you’re attempting to update. For the Fiscal Year 2015 (based on assessment date of 1/1/2014), the range of dates would likely be 1/1/2013 to 12/31/2013 (all sales from the previous calendar year.) After editing an existing filter statement, ***you must click the <u>“Modify”</u> button to save the change***. After editing the sales dates, the filter statement should look like this:

- PARCEL_ID_UNFMT Is Like 999% (999 = your three digit community number)
- PARCEL_YEAR Equal TO 0 (pulling data from the Sales File)
- SALE_DATE Between 1/1/2013 and 12/31/2013

When you receive an IQ procedure from DLS IT, it will have a generic town code in one filter statement: “ PARCEL_ID_UNFMT is like 999%”, which means it will search for parcels beginning with town code 999. Change the 999 code to your community’s DOR jurisdiction code (remember to click Modify to save the change.)

When you’re finished editing the filter statement, click OK (see Figure 3).

Note: when pulling information from the Sales file, Parcel_Year is always 0 (zero.) This special year distinguishes Sales parcels from Inventory parcels, which are flagged with an actual fiscal year.

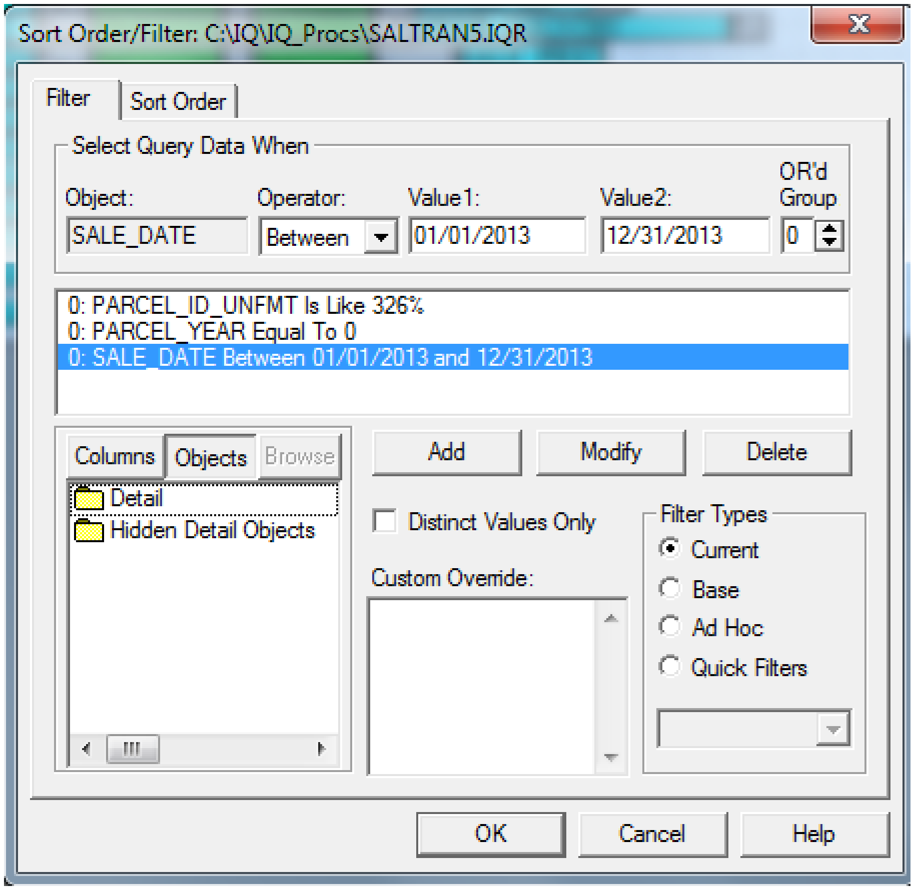
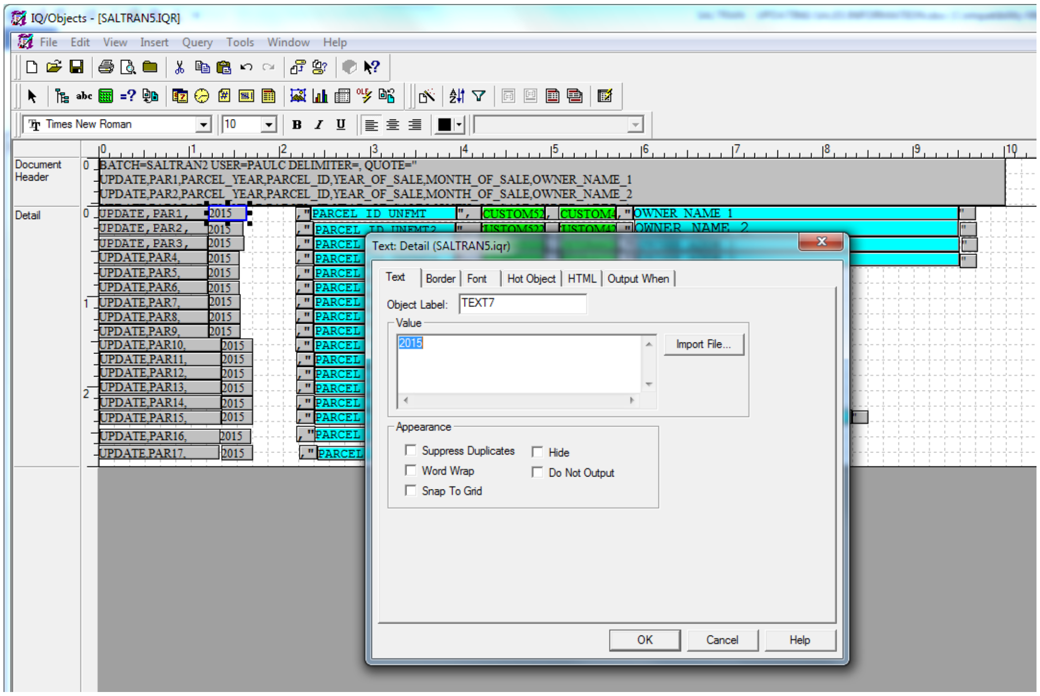


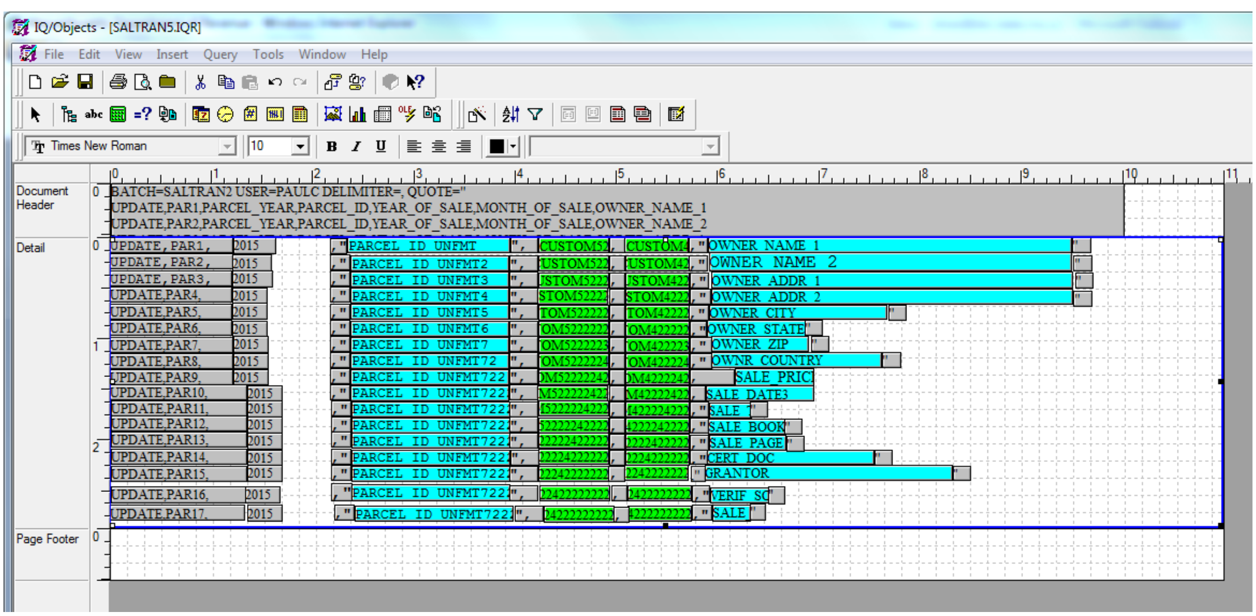
Figure 3 - filter statement after editing

After editing the filter, the next step is editing the Parcel Year in the "Detail" section of the procedure. The Parcel Year appears in the second text box on each line in the Detail section. The Parcel Year needs to be changed on <u>each line</u>. On the first line in the Detail section of the procedure, double-click the first grey box containing the parcel year, or right-click on the box and choose Attributes in the drop-down menu (see Picture 4.)



Picture 4 – Text editing pop-up screen

In the Value window of the pop-up screen, change the Parcel Year to the new year's database (2015) and click OK. This process needs to be repeated for every line in the Detail section of the procedure. There are 17 lines in the Detail section of the "SALTRAN5.iqr" procedure and there are 11 lines in the Detail section of the "SALTRAN8.iqr" procedure. Picture 5 shows what the screen should look like after all lines have been edited for 2015.



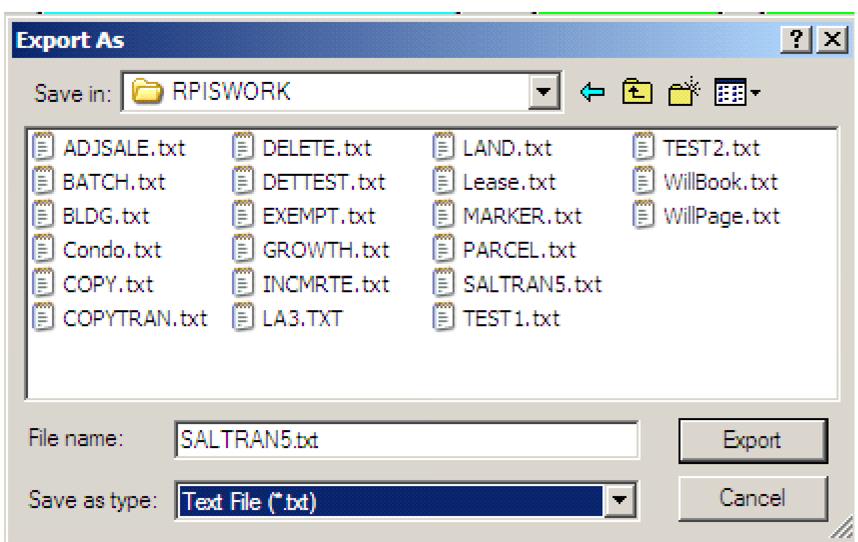
Picture 5 – SALTRAN5.iqr with year edited

After each line in the Detail section of the procedure has been edited click the Save icon on the tool bar . This will save all your procedure changes (it will not save the data – that comes next.)

Running the IQ Procedure

Now that the procedure has been edited, you need to run the procedure to create the transaction file.

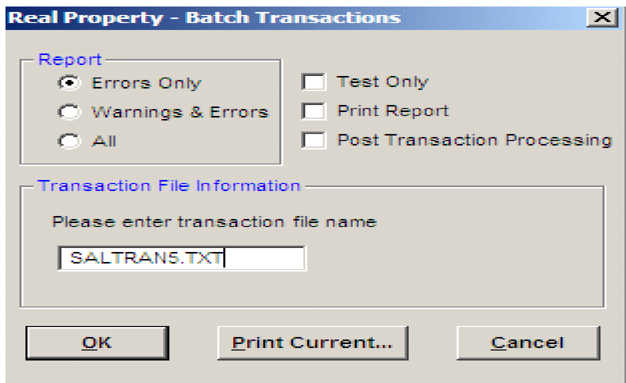
- Click File on the menu bar and choose Export on the drop-down menu.
- At the top of the Export As pop-up screen, click the down-arrow in the "Save in" window and change the destination folder to C:\Sigma\RPISWORK.
- Click the down-arrow in the "Save as type" window at the bottom of the pop-up screen and choose Text File (.txt). The "File name" window should now read SALTRAN5.txt or SALTRAN8.txt, depending on which IQ procedure you use (see Picture 6).
- After you've edited the Export As pop-up screen, click the Export button. The transaction file (SALTRAN5.txt or SALTRAN8.txt) containing all the sales data will be created in the C:\Sigma\RPISWORK folder.



Picture 6 – Export As pop-up screen

Executing the Transaction File in Real Property

After you've run the IQ procedure, minimize IQ and open Real Property (Data Management). On the Search screen in Real Property, click on Tools on the menu bar and choose Batch Transactions on the drop-down list. In the pop-up screen, type the name of your transaction file (SALTRAN5.txt or SALTRAN8.txt) on the blank line under where it says "Please enter transaction file name" (see Picture 7) and then click OK.(You can also right-click in the blank box to bring up a standard Windows Browse dialog box.)

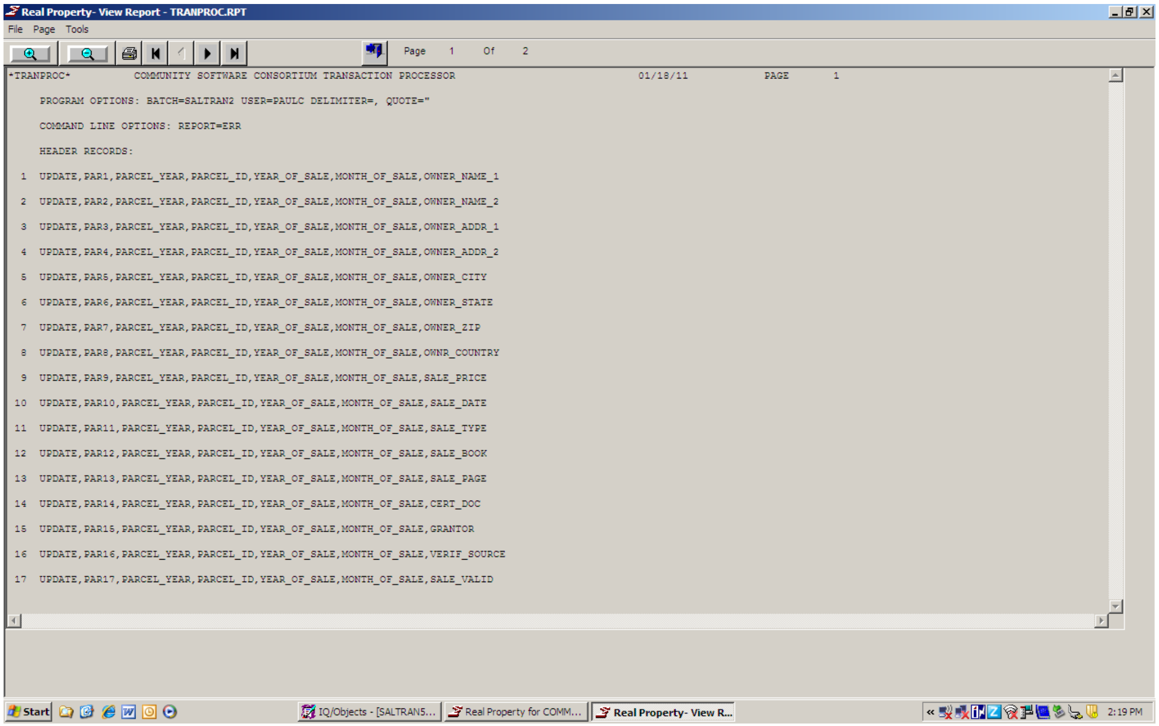


Picture 7 – Batch Transactions pop-up screen

Check the Test Only check box if you wish to test the file first – usually a good idea. This will test the transactions without applying them to the database.

Click OK to run the batch transaction utility program.

After the transaction file runs, a report (TRANPROC.RPT) will be displayed on the screen (see Picture 8).



Picture 8 – TRANPROC.RPT

On the right side of the tool bar, it will display how many pages are in the report; for example, Page 1 of 2. If there are only two pages in the report then there are <u>no errors</u>. Just one error would cause there to be a third page in the report. If there are more than two pages in the report, click the "Print" icon on the tool bar . When you're finished, click the "blue door" on the tool bar to return to Real Property.

Once all errors have been researched and resolved, you can repeat this step, this time leaving the Test Only box unchecked. With Test Only unchecked, the transactions will be applied to the Parcel record in the Inventory file for each sale. Read the report carefully to ensure that no errors occurred during the process.

Note: If this process is run after all the deeds for the chosen year have already been entered in the Par Sales record then it only has to be run once. However, if the process is run before all the deeds for the chosen year have been entered in the Par Sales record, then it should be run again when all the deeds for that year have been entered in the Par Sales record.

Verify the information

After running the batch transaction process, check a reasonable number of parcels to make sure that the sales information transferred successfully from Sales to Inventory. A good way to do this is to compare the Par_Sales record for one of the sales against the Parcel record. Contact your DLS IT advisor if you need assistance or suggestions for how to check the batch results.

For training and technical support…

Contact any of the DLS Information Technology Staff for further assistance or to ask about training opportunities.

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Monday – Friday 8A-3:30PM excluding holidays
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All Boston staff can be reached by dialing their direct numbers or through the IT Support Help Desk.

CAMA Version 3 User Guides, our Support Guidelines and other useful information from the Information Technology section of the Division of Local Services can be found online at http://www.dls.state.ma.us. Information about the Community Software Consortium can be found online at www.csc-ma.us and csc-cloud.ma.us

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